The 1989 Bicycle Market in Review

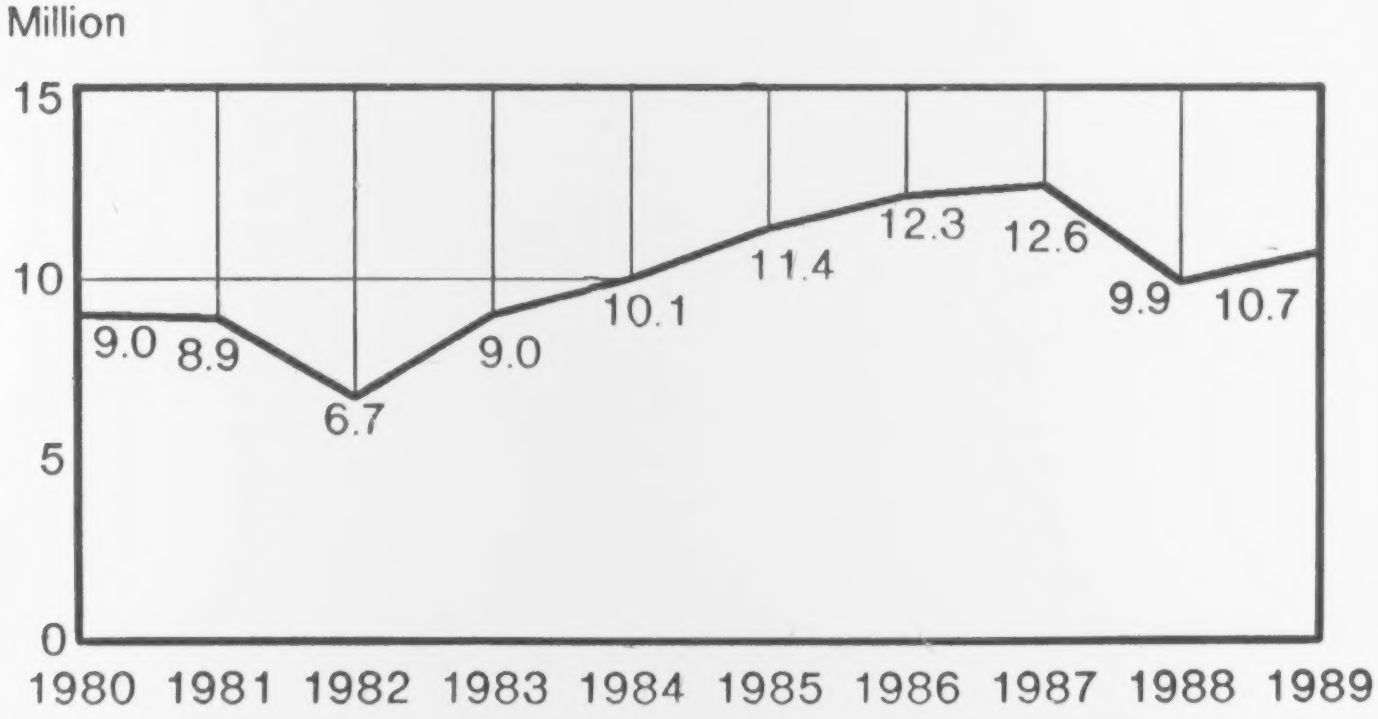
BMA

Total USA Bicycle Market
Domestic Produced Bicycles
Imported Bicycles
Summary

Total USA Bicycle Market

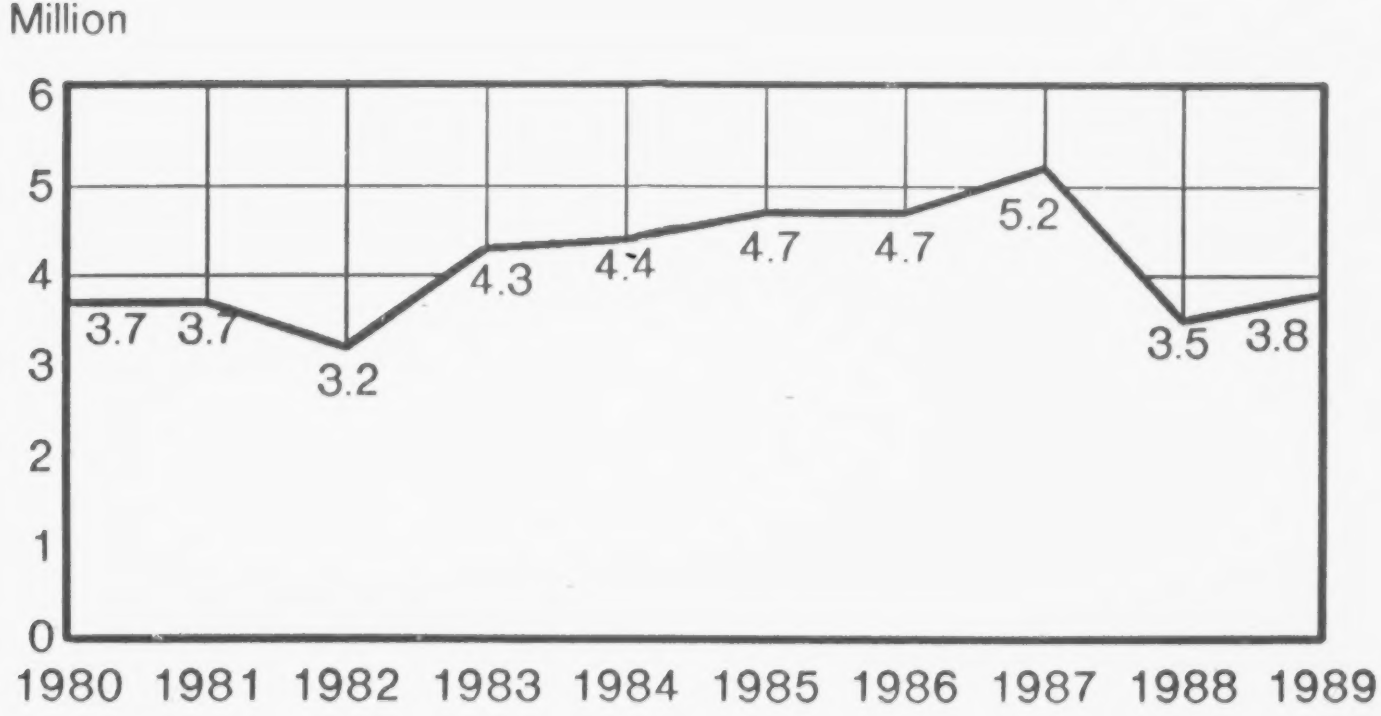
USA Bicycle Market

10 Year History



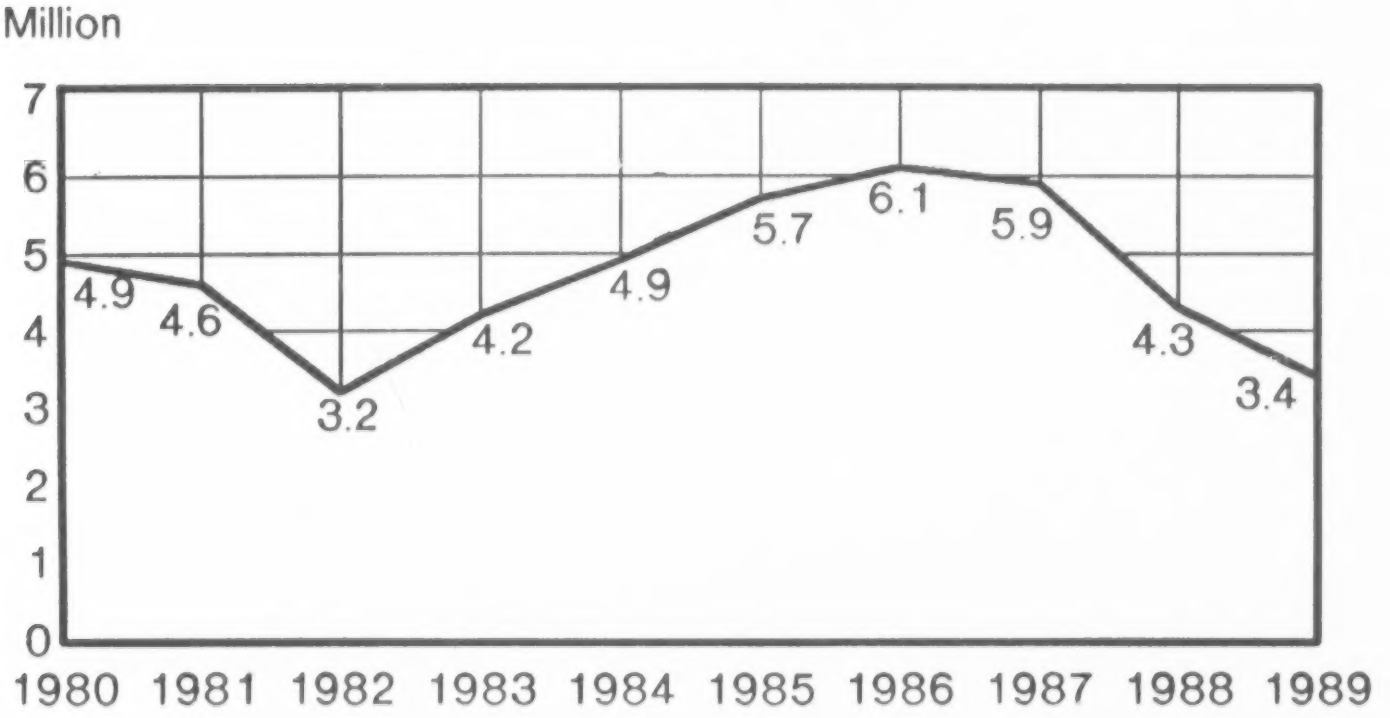
USA 20" Bicycle Market

10 Year History



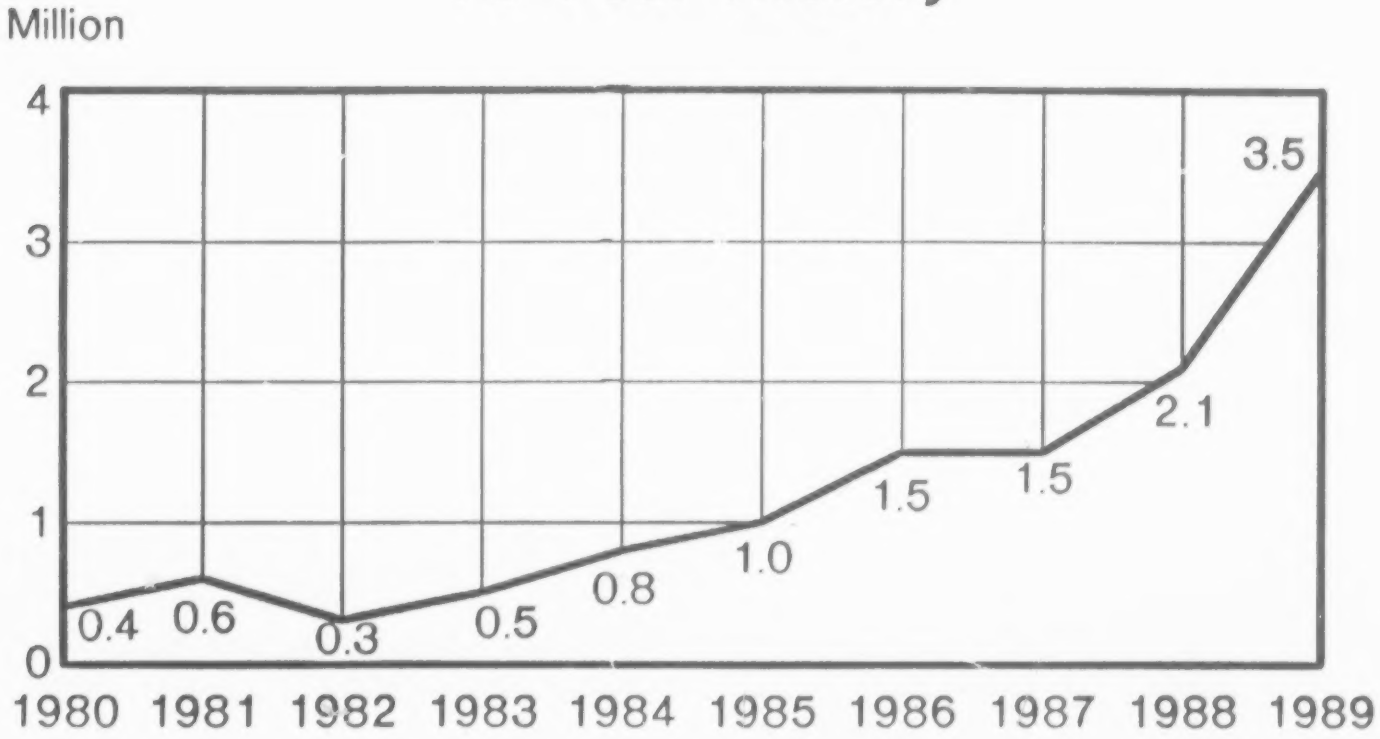
USA Lightweight Market

10 Year History



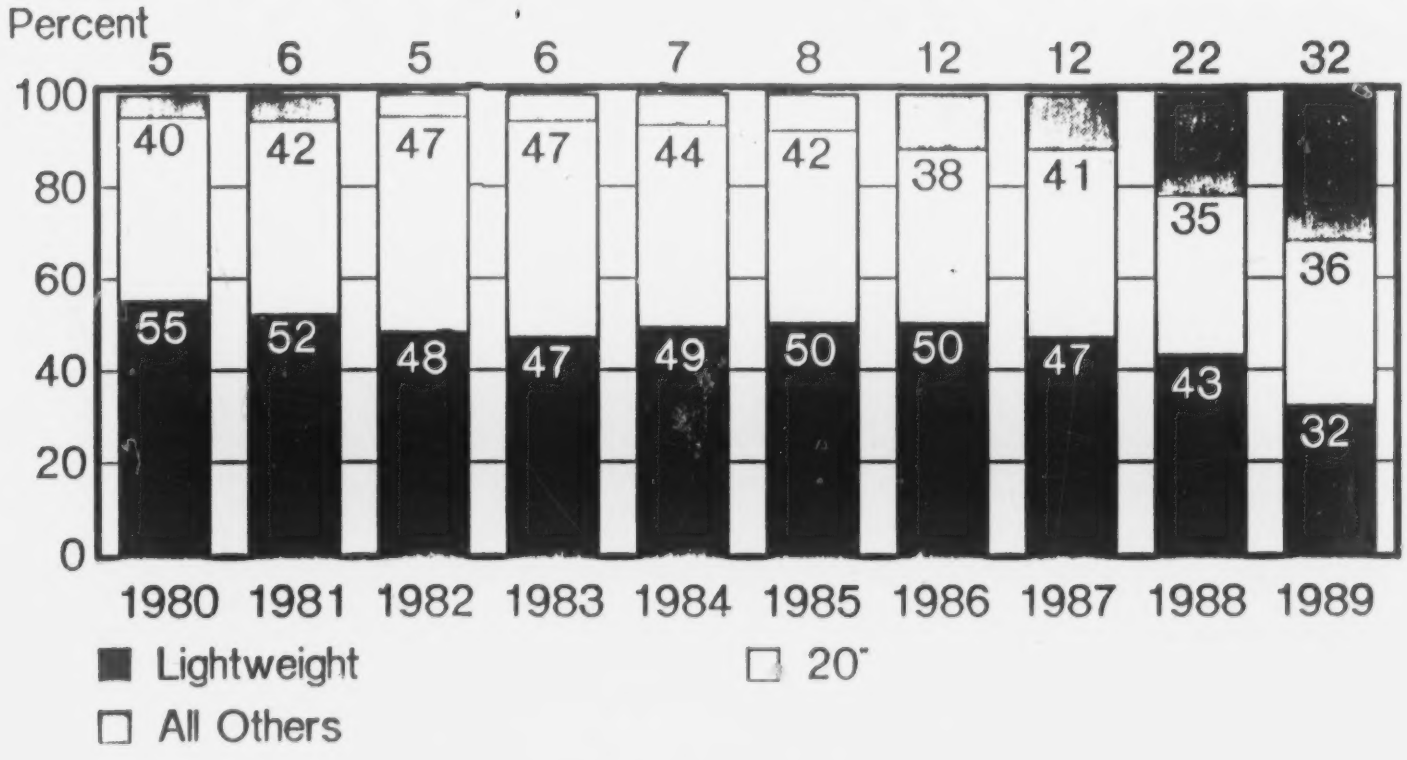
USA "Other" Bicycle Market

(ATB/Cruisers, Middleweights & All Others)
10 Year History



USA Bicycle Market

By Category



Bicycles Entering USA Market

Percent by Quarter 1980-1988-1989

Percent Bicycles Entering USA Market

Month	1980 Month	1980 Qtr. Cum.	1988 Month	1988 Qtr. Cum.	1989 Month	1989 Qtr. Cum.
Jan	6.3%		8.4%		6.5%	
Feb	9.2		11.0		8.6	
Mar	10.2	25.7%	11.0	30.4%	8.4	23.5%
Apr	10.5		10.6		9.9	
May	9.9		8.6		9.2	
Jun	8.6	54.7	7.8	57.4	8.7	51.3
Jul	7.7		7.0		7.6	
Aug	7.6		7.1		6.7	
Sep	8.5	78.5	6.4	77.9	7.9	73.5
Oct	9.3		9.0		10.6	
Nov	7.4		7.4		8.7	
Dec	4.8	100.0%	5.7	100.0%	7.2	100.0%
Total	100%		100%		100%	

Domestic & Import Market Share

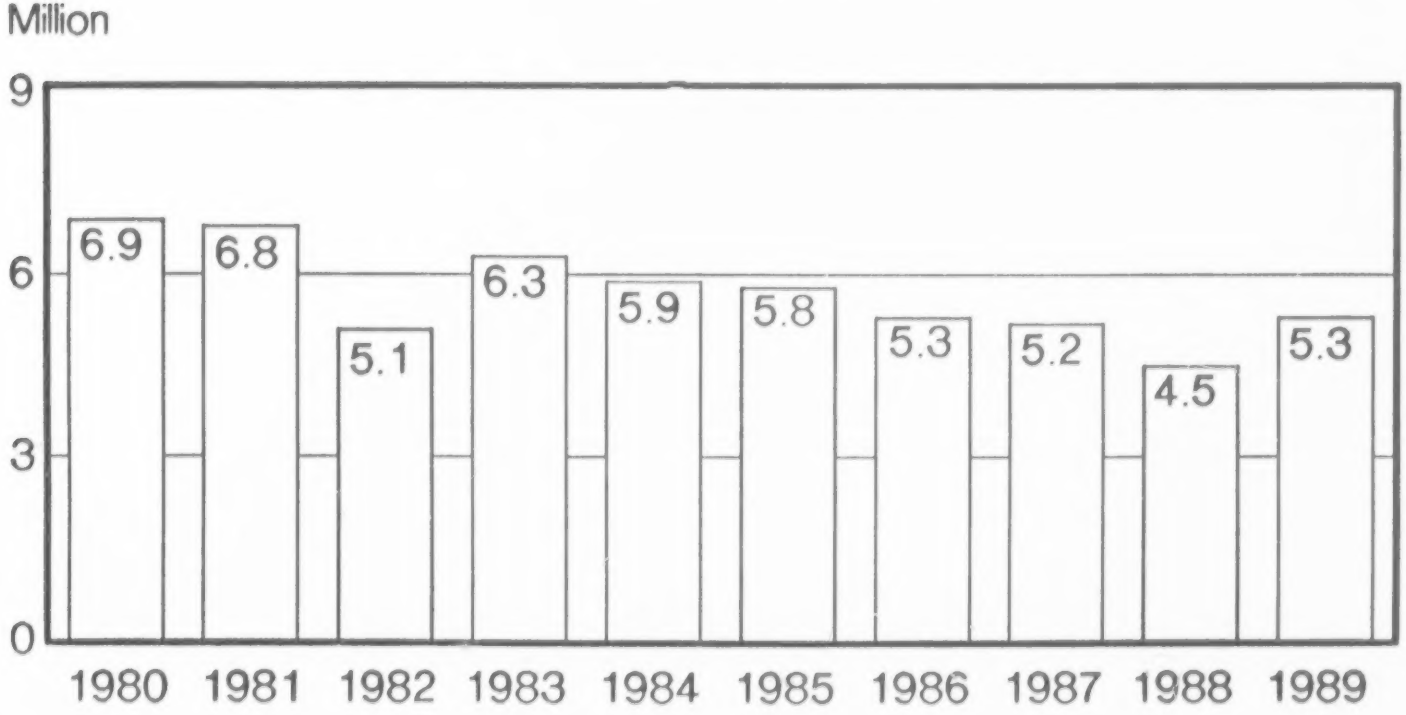
1989 vs 1988 By Major Categories

	1988			1989		
Category	Domestic	Imports	Total	Domestic	Imports	Total
20˚	19.9%	15.4%	35.3%	21.4%	14.5%	35.9%
Ltw	12.3	30.8	43.1	10.2	21.8	32.0
All Other	12.8	8.8	21.6	18.3	13.8	32.1
Total	45.0%	55.0%	100 %	49.9%	50.1%	100 %

Domestic Produced Bicycles

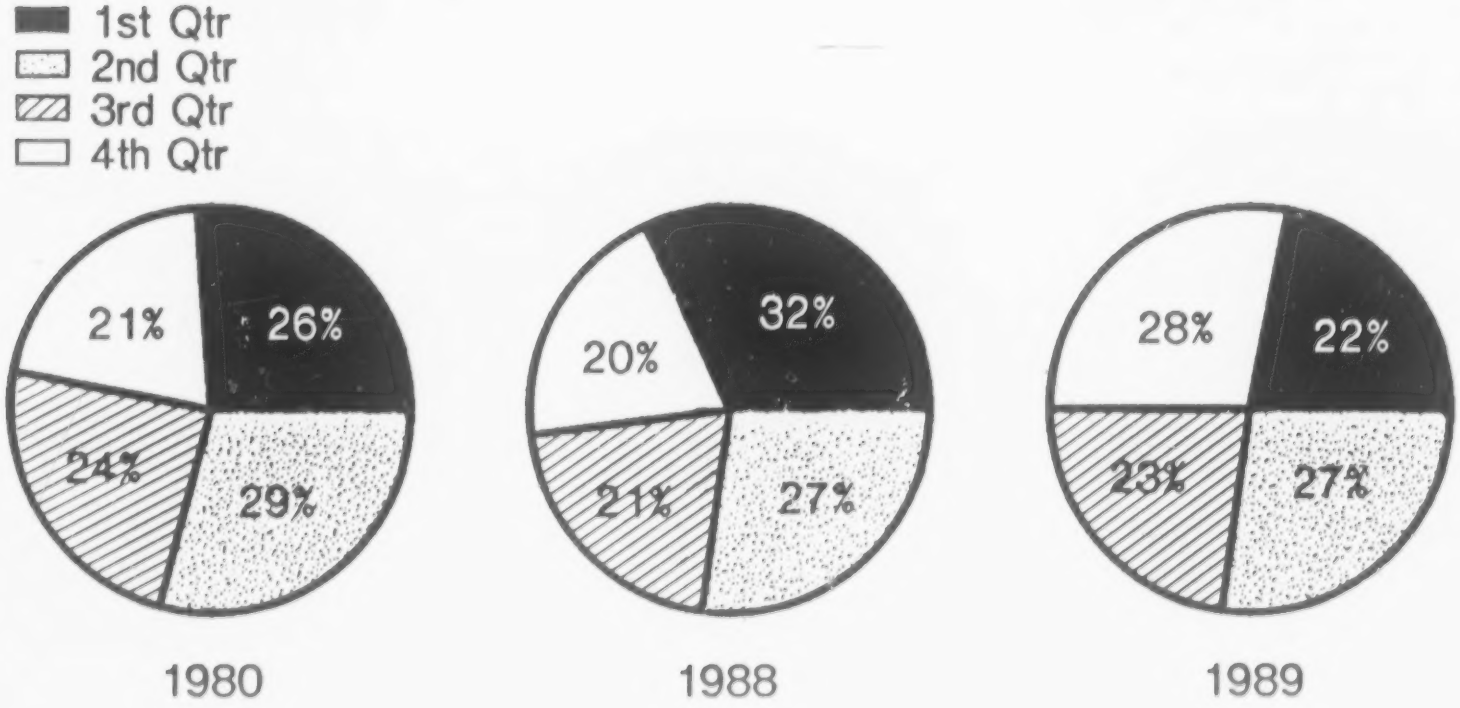
Domestic Bicycle Shipments

10 Year History



Domestic Bicycle Shipments

Percent by Quarter 1980-1988-1989

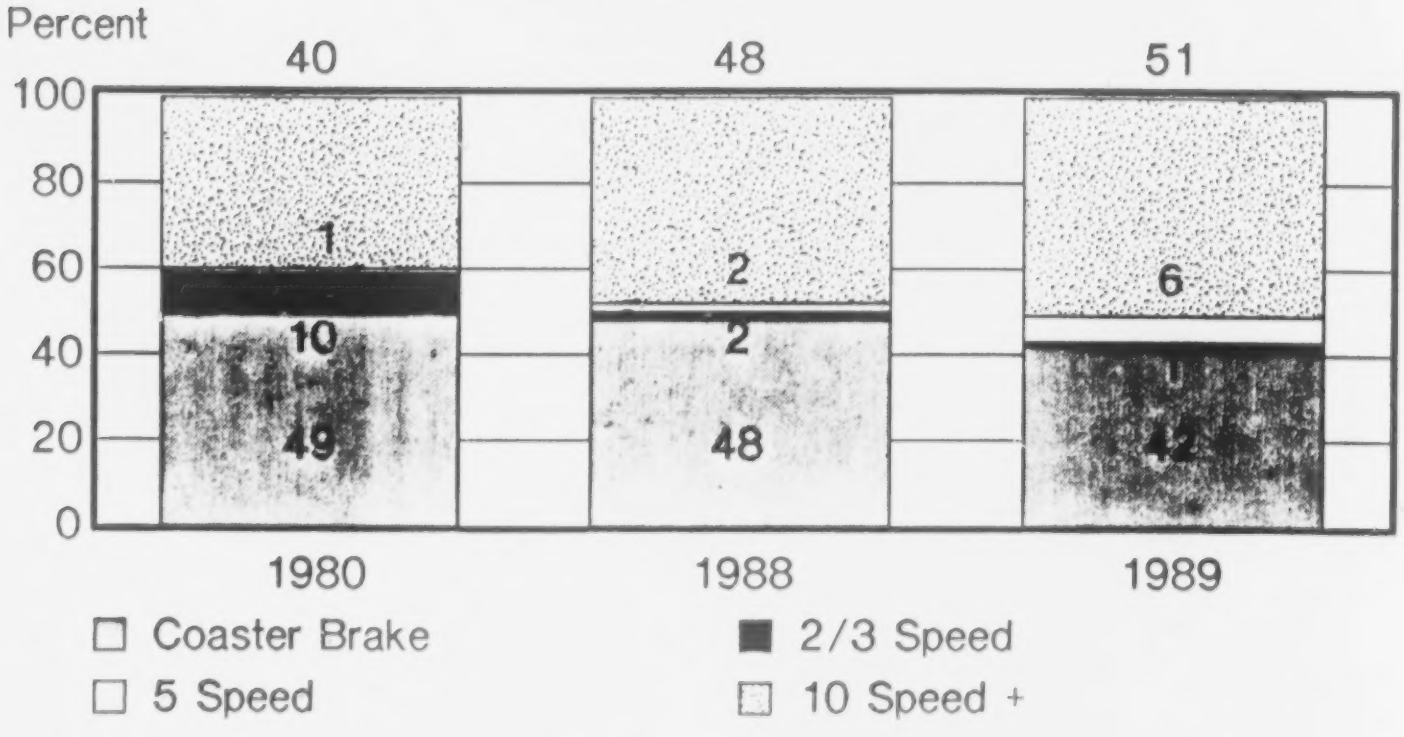


Domestic Bicycle Shipments

% Boy's and Girl's Models

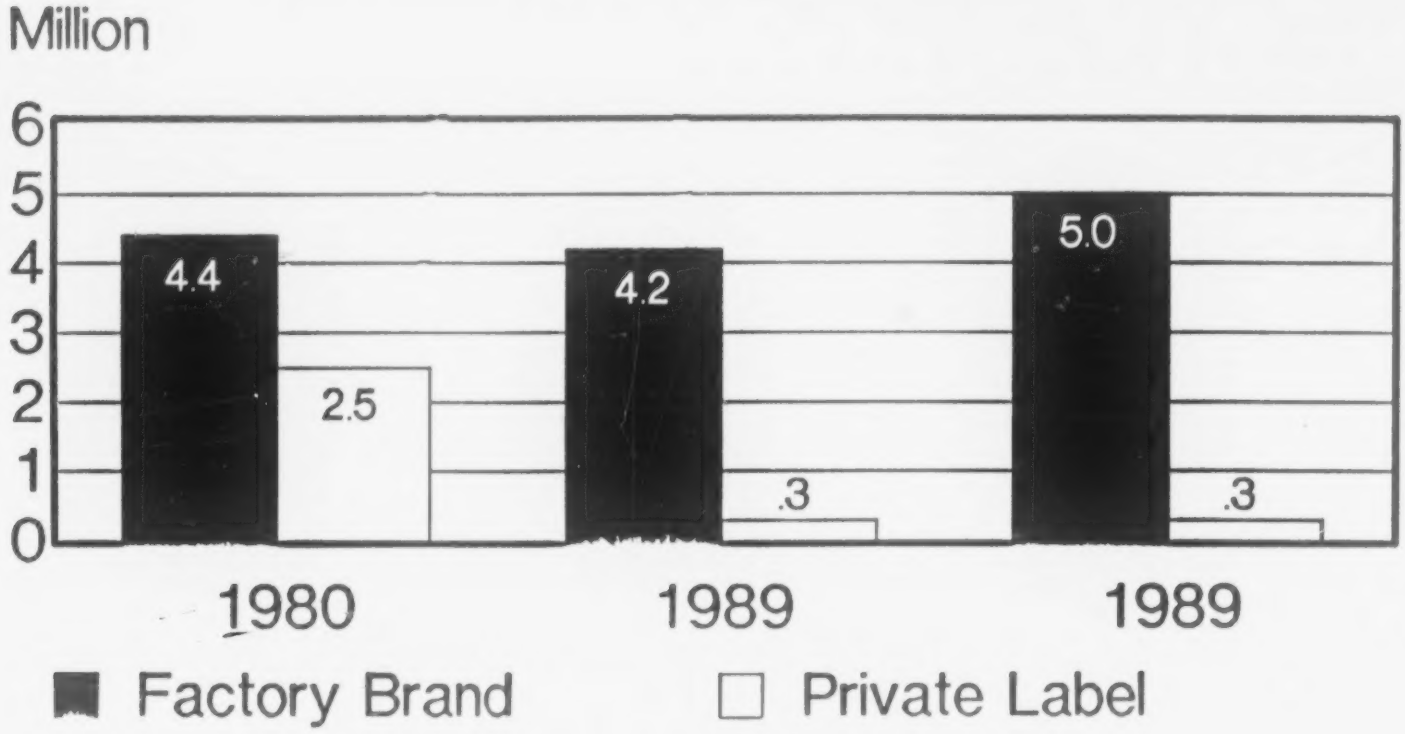
Domestic Bicycle Shipments

% By Type Hub

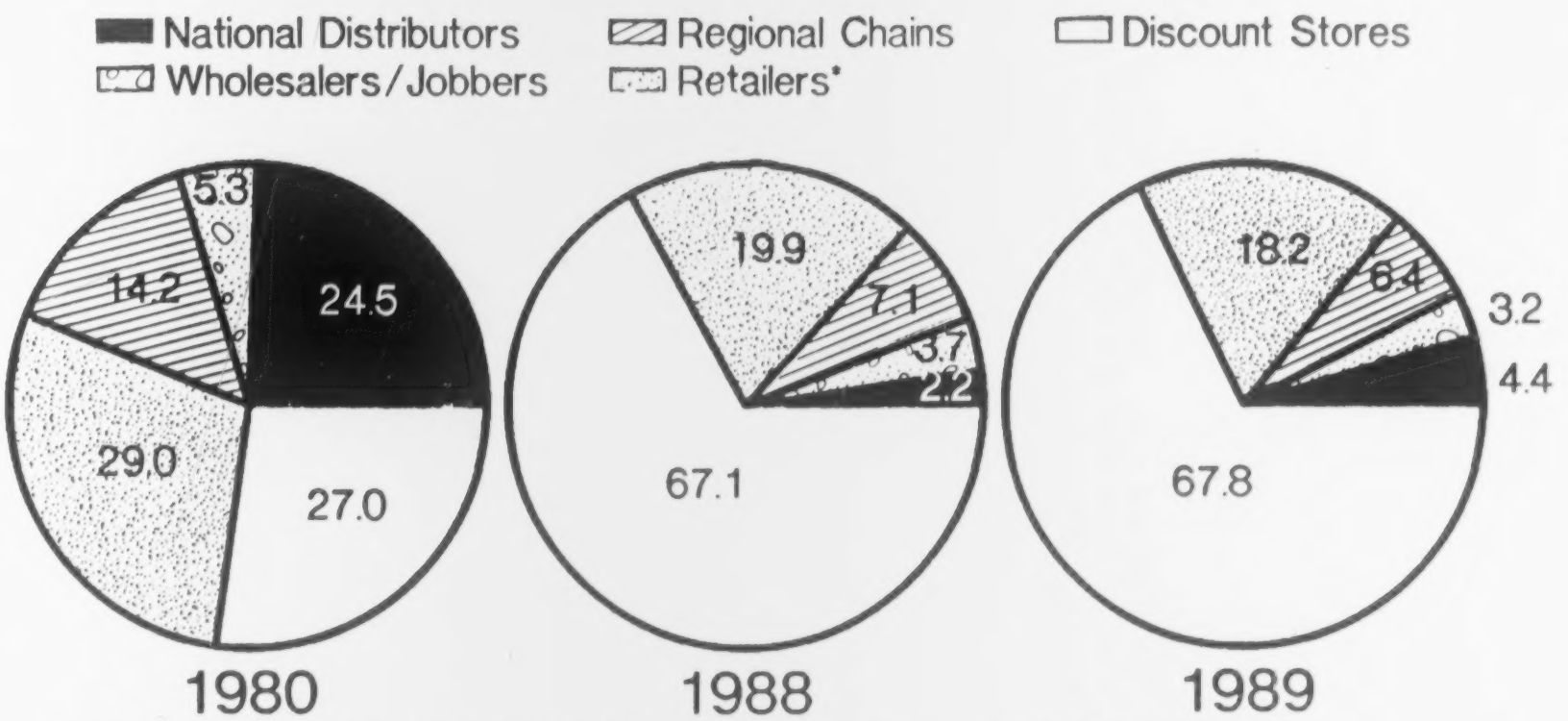


Domestic Bicycle Shipments

Factory Brand vs. Private Label



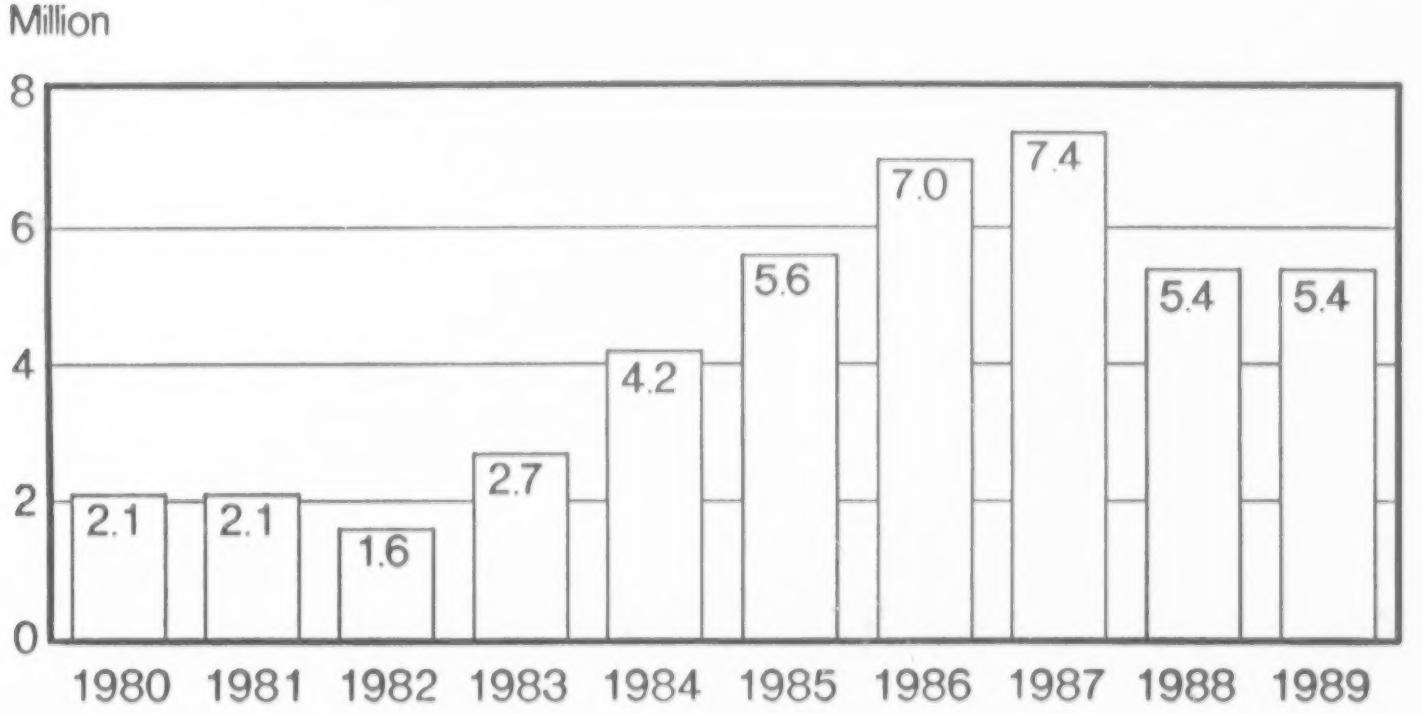
Where Domestic Manufacturers Sell Their Bicycles (%)



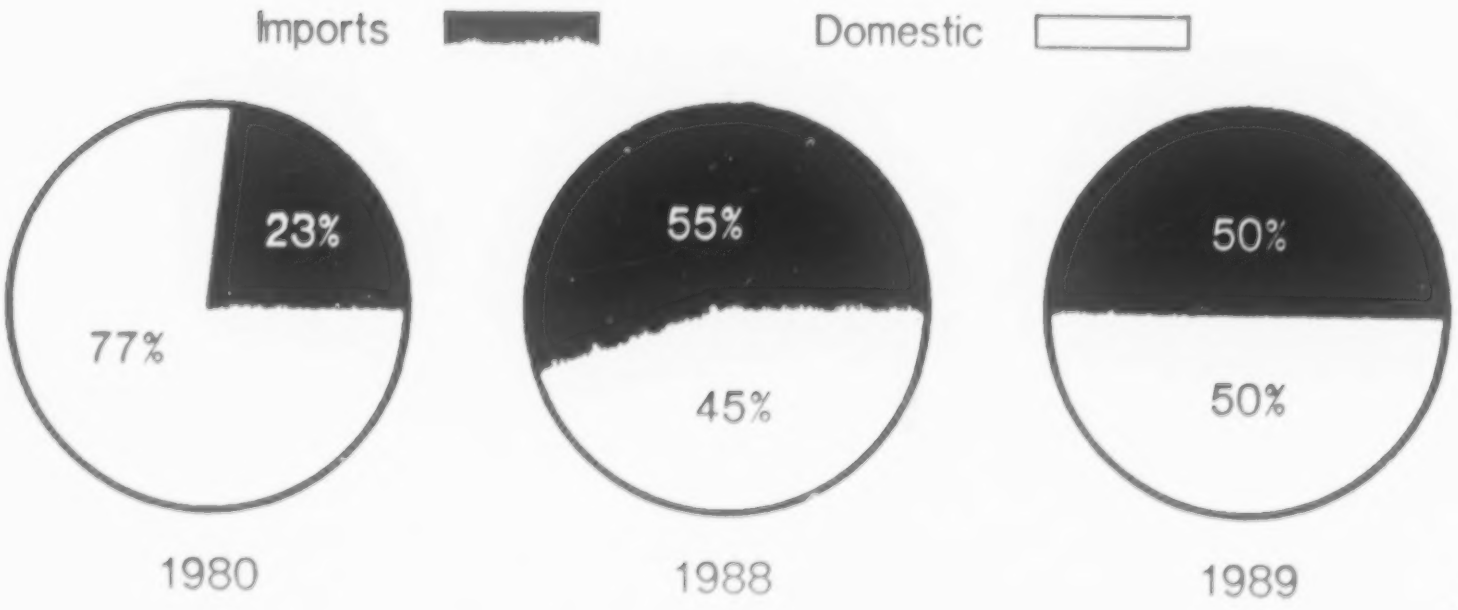
*Includes outlets not elsewhere classified such as bicycle shops, catalog showrooms, etc.

Imported Bicycles

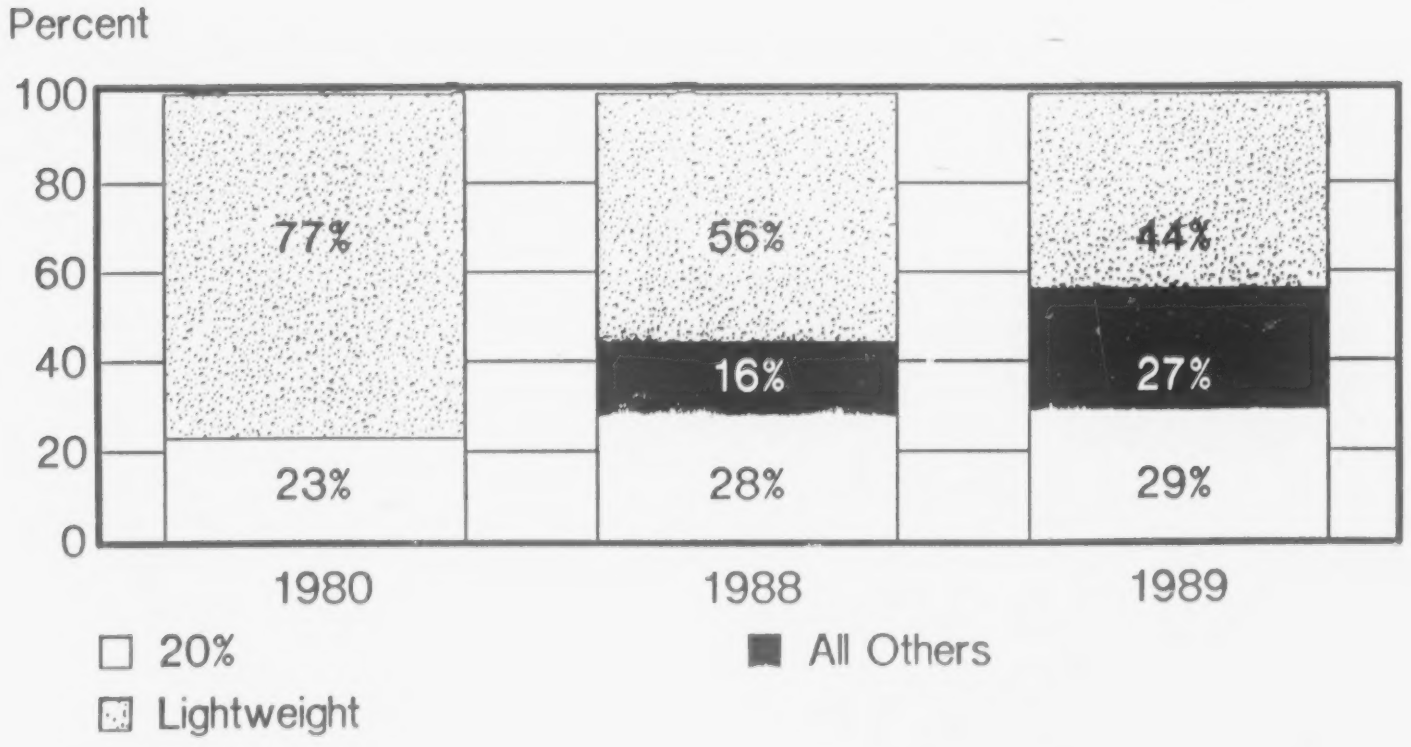
Imported Bicycles
10 Year History



Imported Bicycles
% Share 1980-1988-1989

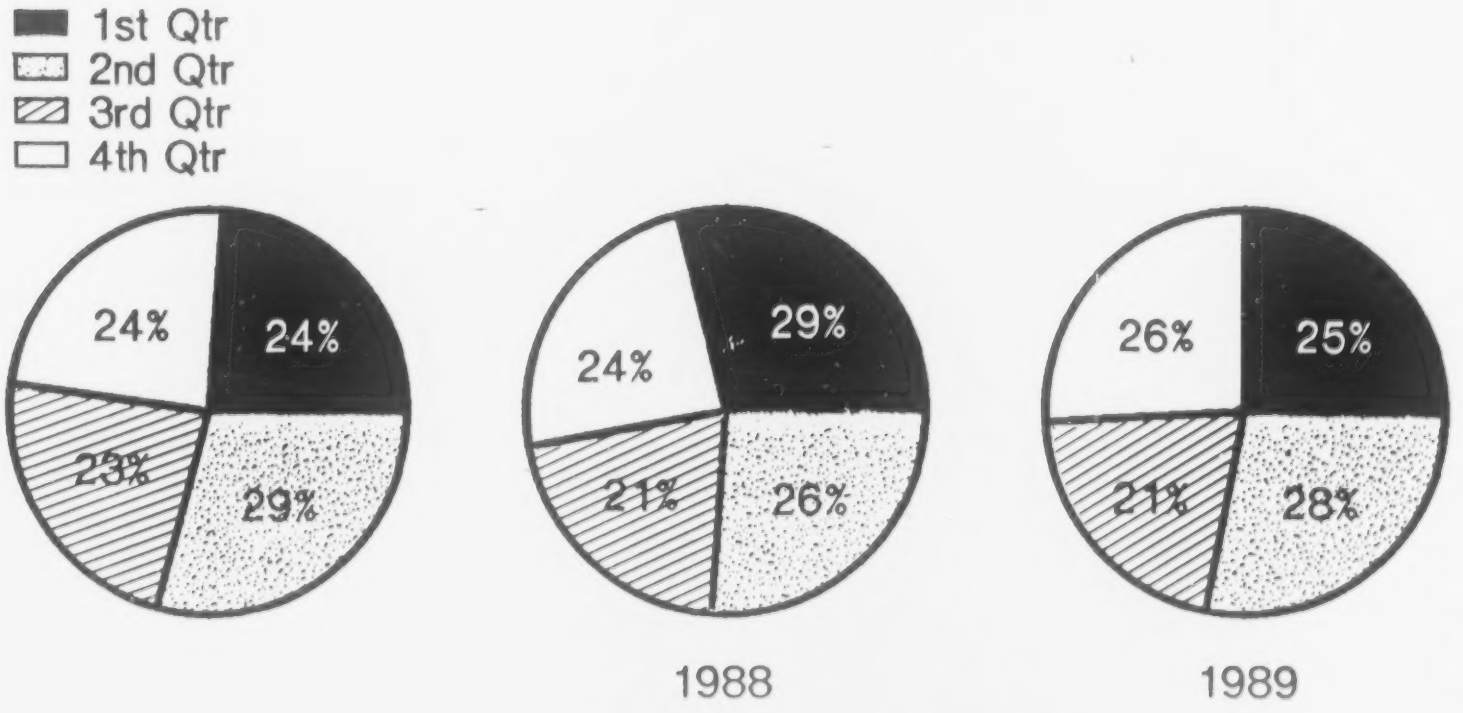


Imported Bicycles
By Type



Imported Bicycles

Percent by Quarter 1980-1988-1989



Imported Bicycles

1988-1989 Monthly Comparison (000)

Year	1988	1989	%Chg
Jan	473	369	(12)
Feb	595	494	(17)
Mar	521	460	(12)
Apr	496	478	(4)
May	490	552	13
Jun	456	497	9
Jul	384	428	11
Aug	408	302	(26)
Sep	333	400	20
Oct	446	450	1
Nov	416	484	16
Dec	421	436	4
Total	5439	5350	(2)

Imported Bicycles

Percent by Country of Origin

Country of Origin	1980	1988	1989
Taiwan	49.1%	66.0%	73.2%
Korea	6.0	24.5	13.9
Japan	30.3	3.9	1.9
China	NA	2.2	6.5
Hong Kong	NA	NA	.7
Thailand	NA	NA	2.6
France	3.7	.5	.2
All Others	10.9	2.9	1.0
Total	100%	100%	100%

Average Dollar Value* Per Unit of 20" Bicycle Imports

Country	1982	1983	1984	1985	1986	1987	1988	1989
Taiwan	51.00	51.69	46.24	42.10	42.15	50.98	49.66	42.76
Japan	93.73	104.88	105.08	99.94	118.86	82.09	150.00	61.43
Korea	50.68	35.45	45.55	43.03	40.23	42.19	42.52	43.25
China	NA	NA	NA	NA	NA	20.37	19.12	25.29
Hong Kong	NA	NA	NA	NA	NA	NA	NA	38.30
Thailand	NA	NA	NA	NA	NA	NA	NA	42.32
Total	$ 53.37	$ 54.41	$ 47.54	$ 43.61	$ 43.04	$ 49.89	$ 46.28	$ 40.81

*Estimated Customs Value FOB Foreign Port

Average Dollar Value* Per Unit of Lightweight Bicycle Imports

Country	1982	1983	1984	1985	1986	1987	1988	1989
Taiwan	61.75	58.08	57.46	51.34	53.09	74.68	89.84	88.59
Japan	114.73	110.41	121.36	107.79	139.02	160.18	195.37	232.72
Korea	58.56	54.43	53.16	48.23	45.59	43.44	48.92	55.82
China	NA	NA	NA	NA	NA	51.04	53.48	56.88
Hong Kong	NA	NA	NA	NA	NA	NA	NA	68.18
Thailand	NA	NA	NA	NA	NA	NA	NA	50.10
Total	$ 83.80	$ 75.59	$ 73.22	$ 63.50	$ 64.45	$ 76.37	$ 83.56	$ 83.88

*Estimated Customs Value FOB Foreign Port

Average Dollar Value Per Unit of Other Bicycle Imports***

Country	1982	1983	1984	1985	1986	1987	1988	1989
Taiwan	75.19	68.49	63.75	69.66	74.87	87.16	108.70	120.06
Japan	174.01	186.67	158.50	147.77	192.78	208.48	256.80	256.26
Korea	NA	NA	57.48	53.66	47.10	42.87	50.67	67.70
China	NA	NA	NA	NA	NA	NA	45.53	90.28
Hong Kong	NA	NA	NA	NA	NA	NA	NA	95.11
Thailand	NA	NA	NA	NA	NA	NA	NA	50.04
Total	$ 81.08	$ 86.17	$ 73.83	$ 75.40	$ 81.47	$ 83.77	$ 114.17	$ 119.15

*Estimated Customs Value FOB Foreign Port
**TSUS Items 732.2100 & 732.2400 Includes Primarily ATB Bicycles

Highlights

- A Total of 10,672,000 Bicycles Entered USA Market in 1989, Up 8% Over 1988 and Above the 10.1 Million Average During the Last 10 Years.
  - –The Previous High was 12.6 Million in 1987
  - –The Previous Low was 6.7 Million in 1982
  - –20" Units Increased 9% Over 1988
  - –Lightweight Units Decreased 21%
  - –ATB and All Other Units Increased 67% Over 1988
  - –Compared to Previous Quarters Fewer Units Entered the Market During the First Quarter in 1989 But More in the Fourth Quarter.

Highlights

- Domestic Shipments Were 5.3 Million Up 18% But Below the 10 Year Average of 5.7 Million.
  - –Previous High was 6.9 Million in 1980
  - –Previous Low was 4.5 Million in 1988
  - –Domestic Shipments Represented 50% of the U.S. Bicycle Market in 1989 Compared to 45% in 1988.

Highlights

- Imports at 5.4 Million Remained the Same as 1988 But Above the 10 Year Average of 4.4 Million.
  - –Previous High was 7.4 Million in 1987
  - –Previous Low was 1.6 Million in 1982
  - –Over 7 Out of 10 1989 Imports Originated in Taiwan Compared to 66% in 1988 While Korean Imports Dropped to 14% From 25% in 1988
- Average Prices of Imports:
  - –20" Units $40.81 Down 12% From 1988
  - –Lightweight Units $83.88 Same as 1988
  - –ATB and All Other Units $119.15 Up 4.4% From 1988.

Highlights

- Finally With the 8% Increase in 1989 Over 1988 and 4 Out of the Last 5 Years Above the 10 Year Average the Bicycle Industry is Anticipating Another Good Year in 1990.